SERVING THE TOTAL FOODSERVICE INDUSTRY

SEPTEMBER 4, 1991

RESTAURANTS & INSTITUTIONS

MENU CENSUS

Top Good Sellers

Best New Items

On-Menu Leaders

Ethnic & Regional Winners

NEW WAYS TO MENU CHICKEN

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SEPT. 4, 1991

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34 R&I EXCLUSIVE: MENU CENSUS 1991

The boneless chicken fillet, seasoned fries and broccoli pictured on our cover are an operator's dream: According to the operators surveyed for *R&I*'s Menu Census, these items not only sell well enough to be on the menu—they're *top* good sellers. In this issue's Menu Census exclusive, "What Sells," we examine the major menu categories and identify, for both commercial and institutional operations, which menu items qualify for good-seller status. Compare your menu to our list of what sells—how do your offerings stack up? Bonus: Sidebars show most-menued items and top-scoring rookie entries.

106 THE SIGNATURE BREAD BASKET

What pleases patrons most about an operation is a warm welcome and a basket of warm and wonderful special breads and rolls. *R&I* presents how-to tips for making your breads and your style of service a topic of conversation. To put a twist on a proverb—cast bread upon the hearth and the customer returns.

164 BIRD WATCHING: CHICKEN AT WORK ON MENUS

Chicken sells in quantity: The Buckhead Diner in Atlanta serves a ton of chicken a week in appetizers and entrees. Chicken sells in multinational garb: TooJay's cross-cultural chicken salad serves Oriental vegetables in a tortilla. And chicken sells to everyone: *R&I*'s 1991 Menu Census says 97.8% of all operations offer some sort of chicken dish. Keep those sales coming with the ideas and recipes for chicken salad, sandwiches, snacks and entrees from our Food feature, "The Versatile Chicken."

185 THE CIA CONDUCTS A POULTRY COURSE

"Techniques in Poultry Fabrication" is an excellent refresher course and a training aid. This chapter in *R&I*'s exclusive serialization of *The New Professional Chef* from the Culinary Institute of America also includes safety and sanitation standards.

197 EASY WAYS TO FILL BREAD BASKETS

Operators seeking products to help fill their signature bread baskets can find sources for frozen doughs, muffin mixes, crackers and trays designed for the display of rolls, muffins, etc., in this issue's Product Catalog.

FOOD 164
A flavorful dish that comes together fast features lightly sautéed chicken, tomatoes and snow peas, served over penne.

®R&I REPORT

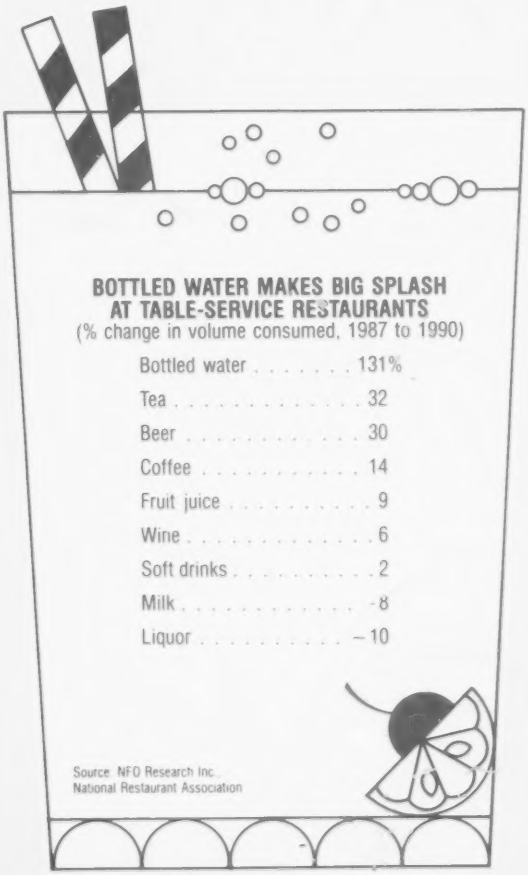
TRENDS

SURVEY CONFIRMS COFFEE IS NO. 1

Consumption of bottled water and tea is growing fastest, but coffee remains the most popular drink at table-service restaurants, according to a recent study by the National Restaurant Association and NFO, a Toledo, Ohio-based research firm.

The study, which tracked the beverage consumption patterns of 10,920 households over a two-week period, shows that coffee accounted for about 29% of all drinks consumed at table-service restaurants in 1990. Soft drinks followed at about 27%, and tea took a 23% share. Beer, at about 8%, was the fourth most popular beverage, while wine, milk and "other non-alcoholic" drinks each took about 3%. Fruit juice and liquor, at about 2% each, rounded out the offerings.

Men consumed more beer and liquor; women and men drank wine in roughly equal amounts. ***—Rajan Chaudhry***



BOTTLED WATER MAKES BIG SPLASH AT TABLE-SERVICE RESTAURANTS
(% change in volume consumed, 1987 to 1990)

Bottled water	131%
Tea	32
Beer	30
Coffee	14
Fruit juice	9
Wine	6
Soft drinks	2
Milk	-8
Liquor	-10

Source: NFO Research Inc., National Restaurant Association

MICROWAVE BURGERS BRUISED IN BATTLE WITH FAST FOOD

Driven by the demand for convenience, the market for frozen microwavable sandwiches is exploding, but at least one segment has learned it's best not to go head-to-head with fast-food restaurants, according to a study by Find/SVP, a New York-based market-research clearinghouse.

Microwavable burgers are apparently the latest victims of the fast-food segment's value pricing, the study suggests.

Buoyed by large marketing and promotional budgets, which kept per-sandwich prices below $1, frozen hamburgers kicked off the microwave craze in 1987. But frozen burgers carry higher distribution and packaging costs than their away-from-home counterparts, which has made the under-a-dollar pricing largely unsustainable. In order to maintain margins, manufacturers and retailers have had to raise prices and, as a result, sales have flattened, the report says.

"Competing hamburger to hamburger and french fry to french fry, frozen convenience food . . . is at a disadvantage," says Peter Allen, vice president of Find/SVP Market Research Reports.

The study also suggests that because microwave burgers force consumers take the time to add their own fixings, the products lose some of their appeal as convenience foods. ***—R.C.***

BUSINESS-TRAVEL COSTS TO RISE 6%

Overall business-travel costs will increase about 6% in 1992 despite low inflation in restaurant and lodging prices, according to forecasts by Runzheimer International travel consultants, Rochester, Wis.

The company expects the cost of meals to rise less than 4% next year; however, Runzheimer also makes the following predictions:

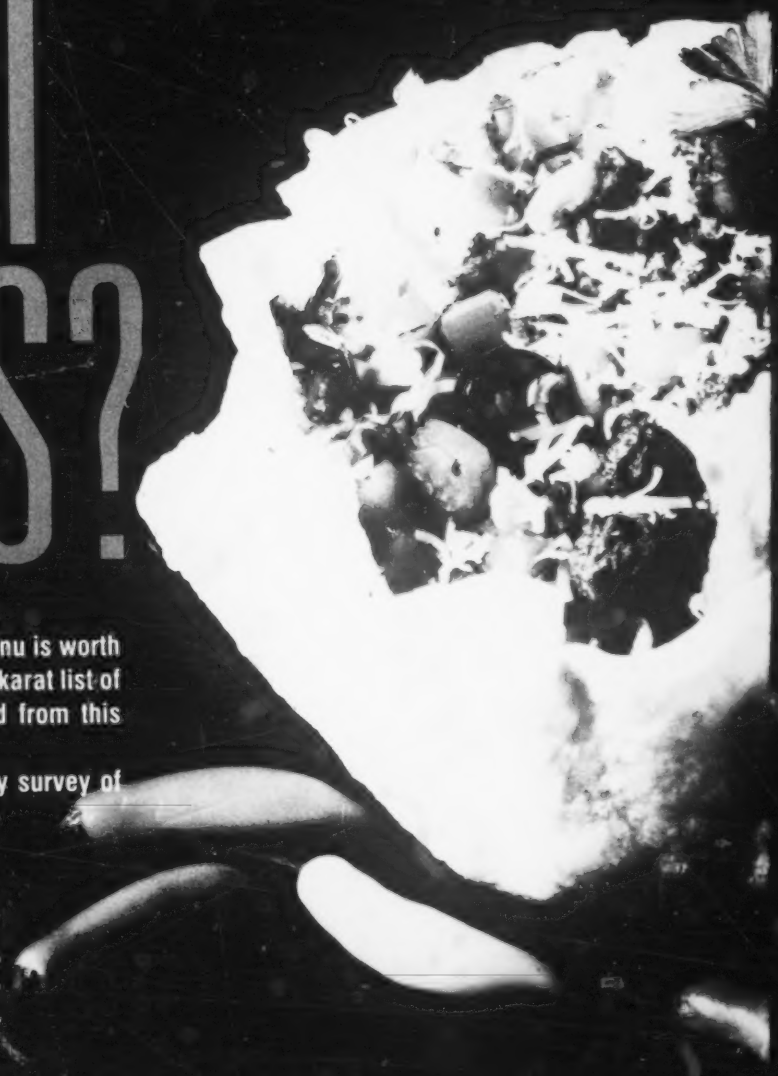
- Airfare will rise about 8% as higher labor expenses and debt payments force airlines to pass on costs.
- Car-rental fees will rise 6%. Auto manufacturers are becoming more stringent with both the purchase and resale of their cars by rental companies. Furthermore, airport fees and insurance charges are on the rise.
- Lodging costs will increase 3%. Although flat occupancy will encourage hoteliers to hold the line on prices, cash-strapped local governments are eager to increase taxes on nonconstituents. Such pressures will fuel the slight rise in prices.

Meals account for about 11% of the business-travel dollar, while airfare takes 46%, lodging captures 22% and car rentals draw 8%, the company says. ***—R.C.***

1991 MENU CENSUS

R&I's nationwide menu poll of all foodservice segments answers the big question:

WHAT SELLS?



By Brian Quinton and Nancy Ross Ryan

A consistent good seller on the menu is worth its weight in gold. Consider the 14-karat list of top good sellers (opposite) mined from this year's Menu Census.

The *R&I* Menu Census, the only survey of its kind, is a mother lode of information for commercial and institutional operators: It gathers and tabulates data for 21 major menu and food categories. Respondents are divided by segments within the broad commercial and institutional categories.

The Menu Census asks operators about the items on their

TOP GOOD SELLERS OF 1991

The items below were named more than any others as good sellers by operators who put them on the menu. (To qualify, items must be on the menu in at least 100 of all operations surveyed.)

COMMERCIAL		INSTITUTIONAL
Nachos	APPETIZERS	Chicken wings
Club sandwich	SANDWICHES	Cheeseburger
Roast beef/prime rib	MEATS	Steak
Chicken breast fillet	POULTRY	Chicken breast fillet
Salmon	FISH/SEAFOOD	Breaded fried shrimp
Fajitas	ETHNIC	Pizza
Chicken/turkey salad	ENTREE SALADS	Taco salad
Seafood chowder	SOUPS	Cream of broccoli
Asparagus	VEGETABLES	Stir-fried vegetables
French fries	POTATOES	French fries
Cobblers/crisps	DESSERTS	Frozen yogurt

Taco salad, named the top good-selling entree salad by institutional operators, also finishes as the No. 3 good-selling ethnic entree for both institutional and commercial segments.

1991 MENU CENSUS

TOP ITEMS NOW ON THE MENU

1. Regular coffee
2. Orange juice
3. Decaffeinated coffee
4. Iced tea
5. French fries
6. Hamburger
7. Hot tea
8. Carbonated soft drink
9. Cheeseburger
10. Potatoes
11. Baked potato
12. Tossed green salad
13. Chicken breast fillet entree
14. Hot chocolate/cocoa
15. Vegetable soup
16. Broccoli
17. Grapefruit juice
18. Whole milk
19. Carrots
20. Coleslaw
21. Tomato juice
22. Chicken breast fillet sandwich
23. Mashed potatoes
24. Grilled cheese sandwich
25. Cheesecake
26. Green beans
27. Apple pie
28. Low-fat milk
29. Chicken soup
30. Dinner rolls
31. Ham and cheese sandwich
32. Mixed vegetables
33. Turkey breast sandwich
34. Cream of broccoli soup
35. Chili
36. Lasagna
37. Breaded/fried fish portion

Survey shows menu trends: half-fit diet, flexible menus, ethnic diversity.

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menus—in this feature, *R&I* examines those items that tallied "good-selling" marks for each segment.

For example, nachos are the top good-selling appetizer overall for commercial operations (see table). But within the commercial category, nachos perform best in casual restaurants, the Menu Census reveals. As for the institutional operations' top good-selling appetizer, chicken wings, the best segment is B&I. And regionally, nachos sell best in the West, and chicken wings in the South, according to the 1991 Menu Census.

The Menu Census also gives data on food and beverage sales and purchasing. Highlights will be featured throughout the year in upcoming issues.

For information on ordering the complete 1991 *R&I* Menu Census, contact Christine Campagna, *Restaurants & Institutions* Bureau of Foodservice Research, (708) 635-8800.

PICKING WHAT SELLS

Our analysis of the 1991 Menu Census focuses on menu items that operators say really sell.

The "good sellers" listed on the pages that follow are not necessarily those items most likely to appear on menus, but those with the best sales records when they are offered to customers. The Menu Census survey asks operators if they have featured a given item on their menus in the last year; any item not offered by at least 100 respondents is ruled out as having too small a sample.

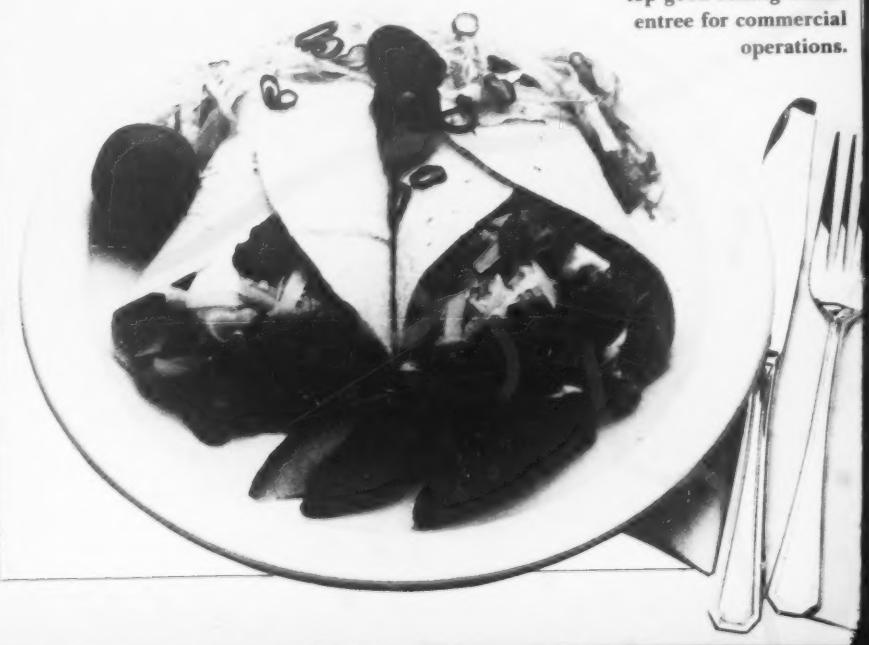
MENU CENSUS TRENDS

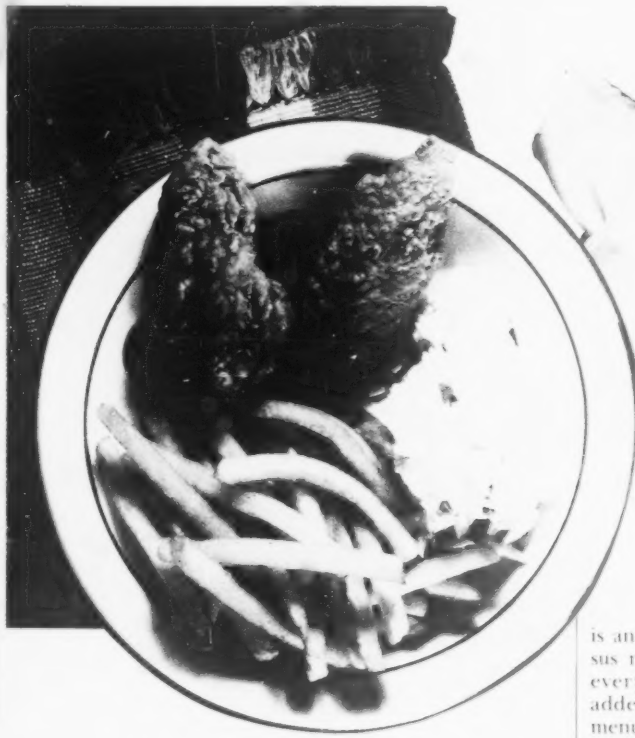
The way Americans eat doesn't change drastically from year to year. Still, changes in the Menu Census over a two-year period reveal some eating-out trends.

The half-fit diet. In this era of unparalleled nutritional concern, people still cling to their favorite foods. Given the inconsistencies of the American diet, the '90s might go down in history as the decade of the half-fit. For example, in the Top Good Sellers of 1991 (see opening pages) french fries still are the No. 1 good seller in the potatoes category for both commercial and institutional operations; roast beef/prime rib and steaks still sell well; nachos and chicken wings are top good sellers among appetizers.

But some Menu Census re-

Fajitas finished as 1991's top good-selling ethnic entree for commercial operations.





Chicken wings took the top good-selling appetizer title in the institutional segment.

sults suggest increased popularity of items with a high health and fitness profile. In this year's fish/seafood category, salmon edged out breaded fried shrimp, 1989's top good seller in commercial foodservice. And seafood items were added to the menus of one out of every five operations in the past year.

The chicken breast fillet was the top good seller in both commercial and institutional segments. Frozen yogurt, a dessert with a perceived good nutritional profile, became 1991's top good-selling institutional dessert. And the club sandwich beat the cheeseburger (1989's good sandwich seller) to the top spot in the commercial segment.

Entree salads debut. A major menu trend to emerge from the 1991 Menu Census is the increase in good-selling main-dish salads. In 1991, the 10 top-selling salads in both commercial and institutional segments contain only one that could be strictly called a side: tossed green salad.

The top three good-selling commercial salads are chicken/turkey, special house and taco; for institutional operations, taco salad, chef's/julienne and shrimp. Caesar salad ranks as the No. 4 good seller in both.

Flexible menus. The increase in entree salads combines with an increase in appetizers to document another trend: the flexible menu. Customers neither feel bound to eat three square meals a day, nor constrained to make those meals traditional when dining out.

Freedom to order a salad as an entree is one example; freedom to order several appetizers in place of an entree is another. The Menu Census reveals that one out of every three operations added appetizers to their menus. And one out of five operations added salads/entree salads.

Ethnic diversity. The top three ethnic-food categories in the Menu Census have not changed since 1989. They remain Italian, Mexican and Asian (in order of "on menu" frequency and items "added in the past year"). However, the survey shows more diversity of menu items within those ethnic categories.

Of equal interest are two ethnic items that have moved into mainstream menu categories: Nachos are the commercial top good-selling appetizer; taco salad, the institutional top good-selling entree salad.

On the following pages are top good-seller rankings and regional and market highlights for appetizers, sandwiches, meats, poultry, fish/seafood, ethnic entrees, vegetables, potatoes and desserts.

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TOP MENU ADDITIONS IN THE LAST YEAR

1. **Chicken wings (appetizer)**
2. **Seasoned/coated fries**
3. **Chicken breast fillet sandwich**
4. **Fajitas**
5. **Any stir-fry**
6. **Appetizer pizza**
7. **Chicken breast fillet entree**
8. **Taco salad**
9. **Pasta/macaroni salad**
10. **Catfish**
11. **Onion rings**
12. **Hot cheese appetizer**
13. **Caesar salad**
14. **Stir-fried vegetables**
15. **Fettuccine**
16. **Spiral fries**
17. **Deep-fried vegetables**
18. **Pizza**
19. **Cream of broccoli soup**
20. **Chicken/turkey entree salad**
21. **Pasta with shrimp**
22. **Broiled/grilled chicken**
23. **Frozen yogurt**
24. **Potato skins**
25. **Lasagna**
26. **Barbecue spareribs**
27. **Burrito**
28. **Oriental/teriyaki chicken**
29. **Imitation seafood (surimi)**
30. **Calamari**
31. **Nachos**
32. **Wild rice**
33. **Antipasto**
34. **Cheese/cheese and fruit**
35. **Spicy/hot chicken**
36. **Enchilada**
37. **Egg roll**
38. **Pasta with red sauce**
39. **Veal/chicken Parmesan**
40. **Rice pilaf**

1991 MENU CENSUS

continued from page 43

APPETIZERS: TOP GOOD SELLERS

COMMERCIAL

1. Nachos
2. Hot cheese appetizer
3. Chicken wings
4. Appetizer pizza
5. Salsa and chips
6. Calamari
7. Smoked salmon
8. Onion rings
9. Potato skins
10. Seafood nuggets
11. Deep-fried vegetables
12. Cheese/cheese and fruit
13. Stuffed mushrooms
14. Fresh avocado
15. Antipasto

INSTITUTIONAL

1. Chicken wings
2. Nachos
3. Onion rings
4. Egg roll
5. Hot cheese appetizer
6. Smoked salmon
7. Deep-fried vegetables
8. Potato skins
9. Fruit cup
10. Cheese/cheese and fruit
11. Melon
12. Meatballs
13. Clams/oysters
14. Cottage cheese
15. Seafood nuggets

MOST OFTEN ON MENU

C: Onion rings
I: Cottage cheese

MOST ADDED IN LAST YEAR

C: Chicken wings
I: Chicken wings

Appetizers in bigger portions and variety help patrons create more flexible meals.

What sells in appetizers? Nachos! They're the No. 1 good seller on commercial menus, No. 2 on institutional.

The phenomenon called "grazing" in the '80s paved the way for Americans' more relaxed mealtime attitudes in the '90s. Encouraged by more flexible menus, customers exercise their eating-out options and order a main-course salad or soup in place of an entree or skip the entree altogether in favor of a selection of appetizers—before heading straight for dessert.

The 1991 Menu Census reflects this new climate in the top good-selling appetizers in both commercial and institutional segments. Operators build check averages with the appetizer menu through low-food-cost items that are easy to prepare (many are convenience items), perceived as a good value, and high in appeal.

Appetizer pizza, with its many popular varieties, appeared as a good seller in the 1989 survey and now turns up as the No. 4 good seller for commercial operators in the 1991 census. The segments in which it performs best are catering, casual restaurants and fine dining. Regionally, it's hottest in the West. (Although it was not listed on enough institutional menus to qualify for the good-seller list, those operations that had it on the menu gave it very high marks, especially colleges/universities and schools.)

Chicken wings, a perennial favorite, are still flying high: They're the No. 1 good-selling appetizer in the institutional segment, where ratings soar in health care, schools, colleges/universities and B&I. And on commercial menus, they perch in the No. 3 spot, performing best in fast-food and casual restaurants.

The good sellers on appetizer menus in both segments share some common features that serve as clues to appetizer appeal: There is a preponderance of crisp textures (almost 50% are deep-fried), and two-thirds of the good-selling appetizers come to the table hot. Variety is the spice of life on appetizer menus—ethnic flavors are well-represented among commercial good-sellers by nachos, appetizer pizzas, salsa and chips, calamari and antipasto.

All of the fast-food operations in the survey rank salsa and chips as a good seller on the menu. They're also popular with more than half of all the fine-dining, casual-restaurant and family-restaurant/cafe-style operations.

The strong ranking of smoked salmon—the No. 6 good seller for institutional appetizer menus, No. 7 for commercial—suggests that even a high-cost food item can be profitable in reduced portions.

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For information circle 135

1991 MENU CENSUS

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SANDWICHES: TOP GOOD SELLERS

COMMERCIAL

1. Club
2. Cheeseburger
3. Patty melt
4. Hamburger
5. Bacon cheeseburger
6. Chicken fillet
7. Hero/poor boy/ submarine
8. Reuben
9. Chicken patty
10. Steak
11. Chicken/turkey salad
12. French dip
13. Sliced chicken/turkey
14. Tuna salad
15. Roast beef

INSTITUTIONAL

1. Cheeseburger
2. Chicken fillet
3. Chicken patty
4. Bacon cheeseburger
5. Hamburger
6. Grilled cheese
7. Reuben
8. Hero/poor boy/ submarine
9. Club
10. BLT
11. Croissant
12. Chicken/turkey salad
13. Steak
14. Gyro
15. Patty melt

MOST OFTEN ON MENU

C: Hamburger
I: Hamburger

MOST ADDED IN LAST YEAR

C: Chicken fillet
I: Chicken fillet

Sandwiches take the biggest bite: 50% of all restaurant lunches, 30% of dinners.

The champ: Cheeseburger is the top good seller for institutions, second only to club sandwich on commercial menus.

Sandwiches are the workhorses of the foodservice industry, portable meals that satisfy the '90s need for convenience and value.

Sandwiches serve as the great menu bridge, spanning breakfast, lunch, dinner and snacks. Sandwiches account for 35% of all restaurant foodservice meals and snacks, according to Park Ridge, Ill.-based NPD/Crest. Broken out by daypart, 19% of breakfasts, 50% of lunches, 30% of dinners and 12% of snacks are sandwiches.

One look at the top good sellers emphasizes the ongoing popularity of beef. On the commercial list, four are variations on the hamburger, two feature sliced beef, and one, steak. In the institutional good-sellers list, four are hamburger-based and one is a steak sandwich. The hamburger is listed on both the 1989 and the 1991 Menu Census as the sandwich most often on menus in both segments.

Within the commercial segment, the hamburger stars in family restaurants/cafes and, surprise, in fine dining; the cheeseburger and the bacon cheeseburger perform best in family restaurants/cafes; the patty melt in fast food. Within the institutional segment, the hamburger is most popular in schools and colleges; the cheeseburger is champion in schools and hospitals; the bacon cheeseburger in schools; and the patty melt in B&I.

Sliced-beef sandwiches, French dip and roast beef, have their strong-performing venus, too. In commercial, it's fine dining; in institutional, schools and hospitals, roast beef in B&I and hospitals.

The steak sandwich has a Menu Census personality all its own: The South is its regional stronghold. Commercially, it's a top good-seller in both fast food and fine dining. In the institutional segment, it performs best in nursing homes and schools.

Next to beef, chicken fills most top-selling sandwiches. On the commercial list, five sandwiches are chicken; on the institutional list, four. Versatile chicken fillings come in the form of patties, fillets, slices or salads. But the undeniable newsmaker of 1991 is the chicken fillet sandwich: It was the item most added to menus in both segments.

The classic club sandwich is enjoying a popularity surge, and deli meats and cheese combos on the top good-seller list show their versatility both hot and cold: grilled Reuben and Hero/poor boy/submarine sandwiches. Both trade solid seventh and eighth-place rankings in both segments.

continued on page 54

1991 MENU CENSUS

continued from page 51

MEAT ENTREES: TOP GOOD SELLERS

COMMERCIAL

1. Roast beef/prime rib
2. Beef fillet/tenderloin
3. Chicken-fried steak
4. Barbecue spareribs
5. Meatloaf
6. Steak (sirloin, T-bone, etc.)
7. Pork roast
8. Pepper steak
9. Pork tenderloin
10. Barbecue beef
11. Chili
12. Veal scaloppine
13. Veal cutlets (breaded)
14. Meat pies
15. Swiss steak

INSTITUTIONAL

1. Steak (sirloin, T-bone, etc.)
2. Roast beef/prime rib
3. Chili
4. London broil
5. Pot roast
6. Beef fillet/tenderloin
7. Chicken-fried steak
8. Barbecue spareribs
9. Pork tenderloin
10. Meatloaf
11. Pork chops
12. Veal scaloppine
13. Flank steak/brisket
14. Meatballs in sauce
15. Baked ham

MOST OFTEN ON MENU

C: Roast beef/prime rib
I: Meatloaf

MOST ADDED IN LAST YEAR

C: Barbecue spareribs
I: Beef stroganoff

Beef still is king of meats on both commercial and institutional menus.

Sirloin, T-bone and kindred cuts stake their claim as top good sellers in the institutional segment.

Americans love real beef—steak and roast beef most of all. Steak (such as sirloin and T-bone) tops the good-seller list in the institutional segment, followed by roast beef. Roast beef (and prime rib) is the No. 1 good seller in the commercial segment, followed by the king of steak, boneless beef fillet. Not surprisingly, hotels and casual restaurants are first- and second-best-performing segments for roast beef; fine dining and hotels for beef fillet. In the institutional segment, B&I and colleges are the first- and second-best segments for roast beef; beef fillet's strongest segment is B&I.

But this year's survey helps spot two strong menu trends in meat: the popularity of regional fare and home-style, back-to-basics dishes. For example, pork takes the fourth-place good-seller ranking in commercial operations with barbecue spareribs, a multiregional specialty. Other regional meat dishes among commercial good sellers are chicken-fried steak (coming on strong in the No. 3 spot), barbecue beef, and chili, a dish that has sparked regional competitiveness from Cincinnati to Texas.

Regional fare in the institutional segment includes chili, chicken-fried steak and barbecue spareribs.

The back-to-basics move that reshaped so many menus last year is reflected by such down-home dishes as meatloaf, pork roast, meat pies and Swiss steak on the commercial good-sellers list.

In institutional operations, back to basics shows up in pot roast, meatloaf, pork chops, flank steak/brisket, meatballs in sauce and baked ham. And meatloaf was most often on the menus of institutional operations in 1991.

General eating trends are helping boost the continuing popularity of meat in general. Center-of-the-plate meat today has a lighter, leaner profile. Portions are smaller in response to the public's growing awareness of the new USDA Dietary Guidelines. In addition, the meat industry has been breeding and feeding beef and pork to reduce the fat content of the meat.

Conversely, the regional and home-style dishes tend to cater to the flip side of the coin. As comfort foods, the portions are larger, and the accompaniments are hearty. Flaky crusts top meat pies, gravy covers meatloaf and chicken-fried steak, and potatoes share plate space with pot roast. Tangy sauce bathes barbecue spareribs and beef, and somewhere, there is sure to be corn bread or biscuits.

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1991 MENU CENSUS

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Both chicken breast fillets and turkey have moved up in the rank of good sellers.

Chicken breast fillets sweep the honors: most often on menu, most added and top good seller in both segments.

POULTRY ENTREES: TOP GOOD SELLERS

COMMERCIAL

1. **Chicken breast fillet**
2. **Broiled/grilled chicken**
3. **Spicy/hot chicken**
4. **Turkey breast**
5. **Fried chicken**
6. **Chicken and noodles**
7. **Whole roast turkey**
8. **Baked chicken**
9. **Chicken nuggets**
10. **Chicken pot pies**

INSTITUTIONAL

1. **Chicken breast fillet**
2. **Turkey breast**
3. **Chicken nuggets**
4. **Broiled/grilled chicken**
5. **Fried chicken**
6. **Baked chicken**
7. **Chicken patties**
8. **Spicy/hot chicken**
9. **Chicken *cordon bleu***
10. **Chicken Kiev**

MOST OFTEN ON MENU

C: Chicken breast fillet
I: Baked chicken

MOST ADDED IN LAST YEAR

C: Chicken breast fillet
I: Chicken breast fillet

Since the last *R&I* Menu Census in 1989, the chicken breast fillet has substantially improved its status as a good-selling item among both commercial and institutional operators. Last time around, it was No. 3 with commercial restaurateurs (behind barbecued and baked chicken) and No. 2 in institutions.

This year, chicken breast fillets are the top-selling poultry item among both commercial and institutional foodservice operations that put them on the menu. On the commercial side, casual and fast-food restaurants are most likely to say they sell well; on the institutional side, hospitals and B&I settings report selling chicken breast fillets most often.

Family restaurants, hospitals and colleges were more likely than other segments to add chicken breast fillets to their menus in the last year. Regionally, fillets are the top good seller among chicken dishes in the Northeast, North Central and South. In the West, they lose out by only a feather to grilled or broiled chicken.

As it has in past years, the ranking of poultry good sellers conveys contradictory messages about preparation techniques. Broiled, grilled and baked chicken dishes, usually low in fat, rank high on both the commercial and institutional lists. But in the middle of both rankings comes the perennial fried chicken. (The questionnaire does not specify skinless or skin-on poultry.) Fried chicken, as might be expected, sells much better in the South and West than in the Northeast and North Central regions.

Overall, specially formed chicken products such as chicken nuggets and patties rate as good sellers about as often in commercial foodservice as in institutional. Schools and colleges, however, find them successful more often than any other institutional segment. On the commercial side, chicken nuggets get the best rating from fast-food operators; casual restaurateurs are most likely to term chicken patties a good seller.

Various forms of turkey, appearing on both sides of the good-seller list, rank higher than in '89. Turkey breast sells well in virtually all operations except nursing homes. Whole roast turkey makes the commercial list of top-10 good sellers, earning its highest good-seller rating in hotel dining. Nevertheless, the survey reveals that half of all institutional foodservice also put a whole turkey on the menu, and almost half of those operations consider it a good seller.

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1991 MENU CENSUS

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SEAFOOD ENTREES: TOP GOOD SELLERS

COMMERCIAL

1. Salmon
2. Butterflied/stuffed shrimp
3. Crab cakes
4. Shrimp scampi
5. Breaded fried shrimp
6. Whole lobster
7. Cod/scrod
8. Swordfish
9. Baked fish portions
10. Flounder
11. Catfish
12. Scallops
13. Mixed seafood platter
14. Perch
15. Breaded fried fish

INSTITUTIONAL

1. Breaded fried shrimp
2. Catfish
3. Shrimp scampi
4. Scallops
5. Mixed seafood platter
6. Orange roughy
7. Breaded fried fish
8. Cod/scrod
9. Snapper
10. Halibut
11. Imitation seafood (surimi)
12. Baked fish portions
13. Trout
14. Grilled/broiled tuna
15. Clams

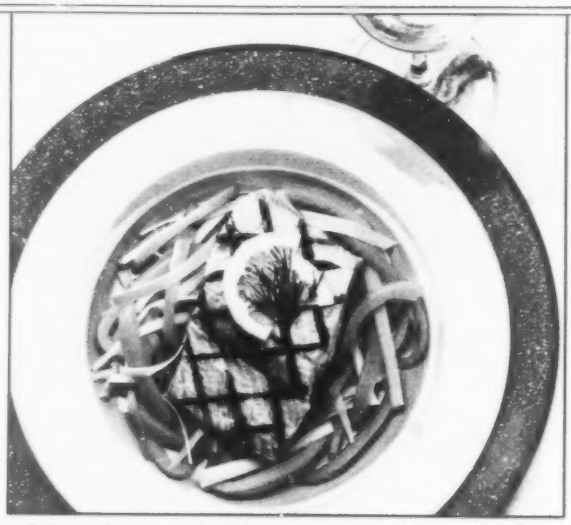
MOST OFTEN ON MENU

C: Breaded fried shrimp
I: Baked fish portions

MOST ADDED IN LAST YEAR

C: Catfish
I: Catfish

Customers' tastes in seafood and its preparation grow more sophisticated.



Salmon takes top honors as a commercial good seller; swordfish, trout, crab and roughy also make the lists.

Two years have made quite a difference in consumers' seafood sophistication. Salmon leads the commercial good sellers, with crab cakes, whole lobster and swordfish following in its wake. Breaded fried shrimp is at the top of the institutional list, where it swims with catfish, scallops, orange roughy, cod and scrod, snapper, halibut and trout. Tuna appears, too, grilled or broiled.

Compare those rankings to two years ago, when the top six on the commercial list began with breaded fried shrimp and included broiled shrimp, sautéed scallops and breaded fried scallops. Among institutional menus, the top good sellers included breaded fried shrimp, breaded fried-fish portions and tuna casserole.

In fact, at first glance, this year's institutional good-seller list seems even broader than the commercial one. This is merely a statistical quirk: Lobster, crab cakes, butterfly shrimp and other items not easily adapted to institutional foodservice have pushed roughy, snapper, trout and tuna just below the cut-off point on the commercial list.

The best explanation for this explosion of variety is growing customer knowledge and sophistication. American diners have, in the course of the last few years, taken so firmly to the seafood habit that many now are looking beyond the basic fish and shellfish—sole, perch, clams, shrimp—and the usual frying techniques.

Not that the perennials are being neglected; breaded fried shrimp and baked fish portions still are the seafood items most often on menus. But fried shrimp no longer is the top good seller at commercial operations, as in '89. It's not even the top good-selling shrimp dish, having been overtaken by both butterflied shrimp and shrimp scampi.

These good-seller lists indicate that operators might do well by offering up-market seafood that breaks away from the familiar.

For example, consider the catfish success story. In the last Menu Census, catfish was nowhere to be found on the good-seller list, though it was the item most often added to all menus. This year, catfish is the No. 11 good-seller at commercial operations that offer it, and an amazing No. 2 in institutions that do so.

The good-seller lists show little regionality. But each regional top 10 includes one type the others don't: flounder in the Northeast, orange roughy in the North Central, scallops in the South and tuna in the West.

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1991 MENU CENSUS

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ETHNIC ENTREES: TOP GOOD SELLERS

COMMERCIAL

1. Fajitas
2. Enchilada
3. Taco salad
4. Pizza
5. Any stir-fry
6. Pasta with shrimp
7. Pasta with red sauce
8. Veal/chicken Parmesan
9. Lasagna
10. Fettuccine
11. Burrito
12. Italian sausage
13. Manicotti
14. Chimichanga
15. Oriental/teriyaki chicken

INSTITUTIONAL

1. Pizza
2. Fajitas
3. Taco salad
4. Taco
5. Lasagna
6. Chimichanga
7. Pasta with red sauce
8. Burrito
9. Any stir-fry
10. Oriental/teriyaki chicken
11. Spaghetti with sauce
12. Spaghetti with meatballs
13. Manicotti
14. Fettuccine
15. Pasta with shrimp

MOST OFTEN ON MENU

C: Lasagna
I: Lasagna

MOST ADDED IN LAST YEAR

C: Any stir-fry
I: Fajitas

Italian fare rules in commercial units, but institutions try Mexican and Oriental.

Pizza and other Italian entrees still dominate the ethnic category, but Mexican is closing the gap.

The ethnic category is a mix of tried-and-true standards and up-and-coming trends, as a glance at the list suggests. No standard could be more reliable than pizza, the top good-selling choice of institutional operators this year just as it was in '89. But fajitas didn't even make it onto the top 10 list two years ago; today they rank No. 1 with commercial restaurateurs and are the year's most-added menu item in institutions.

Meanwhile, lasagna is the ethnic entree most often listed on menus in both types of foodservice, but it doesn't top either good-seller list—the classic example of a menu workhorse that rarely becomes a menu star.

Among the three major ethnic cuisines, Italian is far and away the dominant presence on menus: Almost 73% of commercial menus and almost 99% of institutional menus feature some Italian entree. All told, 82% of all foodservice operations offer an Italian entree, compared to 57% serving a Mexican main dish and 51% an Asian entree.

But those figures don't tell the whole story. Most institutional operators must be generalists, offering a taste of many different cuisines. On the other hand, commercial restaurateurs can work a narrower vein of the world's cuisines. For that reason, institutional operations are much more likely than commercial foodservice to have both Mexican and Asian entrees on the menu—in fact, about *twice* as likely.

Examined by menu segment, fajitas most often are successful in lodging foodservice, followed by casual and family-dining restaurants. Among institutional foodservice, they rank highest with B&I account managers. Not surprisingly, pizza fares best in fast food, schools and B&I.

It's worth noting that taco salad, No. 3 on both lists of good-selling ethnic entrees, also was included in the category of all entree salads—and came in as the top overall good seller in that group.

Pasta still holds a place of honor on the good-seller roster. To be specific, it holds *five* places on the commercial list and *seven* on the institutional one. The list of institutional offerings includes interesting dishes: Pasta with shrimp, manicotti and fettuccine sell well, following, of course, lasagna and pasta with red sauce.

The top-selling Asian entree is really a technique, not a specific dish—stir-frying. Most often ranked a good seller by those caterers and B&I managers who offer it, stir-frying has its fewest fans in schools and fast food.

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1991 MENU CENSUS

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SIDES & POTATOES: TOP GOOD SELLERS

COMMERCIAL
1. Asparagus
2. Stir-fried vegetables
3. Green beans
4. Corn on the cob
5. Broccoli
6. Mixed vegetables

INSTITUTIONAL
1. Stir-fried vegetables
2. Broccoli
3. Onion rings
4. Green beans
5. Corn on the cob
6. Any other corn

MOST OFTEN ON MENU
C: Broccoli
I: Carrots

MOST ADDED IN LAST YEAR
C: Stir-fried vegetables
I: Stir-fried vegetables

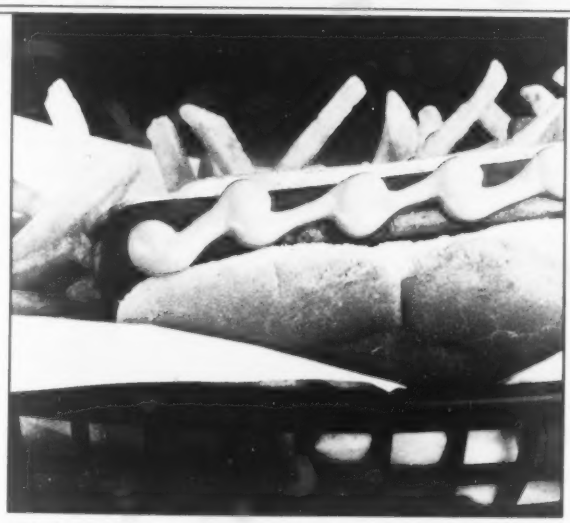
COMMERCIAL
1. French fries
2. Baked potato
3. Seasoned/coated fries
4. Mashed potatoes
5. Stuffed potato entree
6. Formed/shaped potato

INSTITUTIONAL
1. French fries
2. Seasoned/coated fries
3. Mashed potatoes
4. Baked potato
5. Spiral fries
6. Hash browns

MOST OFTEN ON MENU
C: French fries
I: Mashed potatoes

MOST ADDED IN LAST YEAR
C: Seasoned/coated fries
I: Seasoned/coated fries

French fries are still the top tuber—plain, seasoned, straight or curly.



The fries have it: Potatoes are the top-selling side dish, and french fries are the top-selling potato.

This year, for the first time since the *R&I* Menu Census began, the potato's versatility and its hands-down dominance as a side dish earn it a category of its own. In fact, the top four potato dishes get higher good-seller ratings than the top vegetable side dish in both commercial and institutional settings.

Among spuds, the french fry is king. This is the traditional plain french fry, straight or crinkle cut, as served in diners and drive-thrus across the land. Add to that the many variations—seasoned or coated fries, spiral fries and cottage fries—and french-fried potatoes are undoubtedly America's entree accompaniment of choice.

Fast-food operators are, of course, the commercial operators most likely to report good sales from french fries, with family restaurateurs next and casual-dining operators third. On the institutional side, french fries sell about equally well in schools, colleges and B&I accounts. According to the operators who offer them, french-fry sales show particular strength in the South.

Seasoned or coated fries were the potato dish most often added to menus in the last year, mostly in the same segments that have good french-fry sales. All these segments report that they sell well; but seasoned fries also have the respect of those hospital foodservice directors who offer them. The South added the highest proportion of potato dishes to its menus.

The third french-fry variant, the spiral-cut fry, racks up its best sales results from casual dining, followed in order by fast food, B&I, colleges and hospitals.

What of non-fried potatoes? The baked variety rises from No. 6 on the '89 list of commercial good sellers to No. 2 this year, with particularly good sales results in casual and family dining. Institutional operators say baked potatoes sell best in B&I accounts.

Potatoes aside, the vegetable side dishes that sell well in institutions often are stir-fried, according to this year's Menu Census. Stir-fried veggies also are this year's most frequent menu addition, especially in B&I, hospitals and hotels.

In the vegetable category, the Menu Census lumps together fresh items with frozen, and items available year-round with those that are highly seasonal. That's how an upscale vegetable such as asparagus can earn the top spot as a commercial good seller: When it's on the menu, it sells very well, especially in upscale restaurants.

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1991 MENU CENSUS

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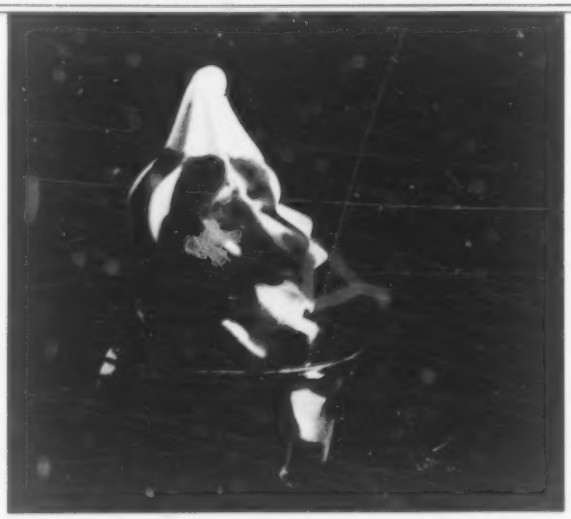
For a popular dessert, consider the cobbler: easy to make, and a top good seller.



Frozen yogurt, a rookie entry in the last Menu Census, now scores higher than any other institutional dessert.

DESSERTS: TOP GOOD SELLERS

COMMERCIAL

1. Cobbler/crisp
2. Cheesecake
3. Specialty pie
4. Soft ice cream
5. Specialty cake
6. Apple pie
7. Chocolate cake
8. Ice cream pie
9. Frozen yogurt
10. Lemon meringue pie
11. Cream pie
12. Carrot cake
13. Ice cream specialty
14. Chocolate pie
15. Pastry tray

INSTITUTIONAL

1. Frozen yogurt
2. Cheesecake
3. Brownies
4. Cookies
5. Apple pie
6. Chocolate cake
7. Soft ice cream
8. Pecan pie
9. Carrot cake
10. Crepes
11. Cream pie
12. Specialty cake
13. Chocolate pie
14. Ice cream specialty
15. Lemon meringue pie

MOST OFTEN ON MENU

C: Cheesecake
I: Cookies

MOST ADDED IN LAST YEAR

C: Frozen yogurt
I: Frozen yogurt

The ranking of good-selling desserts reveals several surprises among a lot of common-sense entries. One surprise is unmistakable—the ascent of cobblers and crisps to the No. 1 commercial spot, replacing ice cream.

The best explanation for the success of cobblers and crisps might be that they tap into a taste for simple American cuisine and offer a change from the usual round of ice cream, cake and pie. The survey shows they have their highest success rate in fine dining, but they are almost equally successful in hotels and in casual and family restaurants.

Frozen yogurt, the institutional dessert leader, does best in schools and B&I operations; on the commercial side, of course, its forte is the fast-food sector. Frozen yogurt also was the most frequently added dessert in the last year, particularly in the Western region.

Crepes are a surprise on the institutional good-seller list. But they are most often offered, and most often successful, in B&I operations, though colleges also feature them and report good results. Here, too, is a dessert that succeeds by being both simple and out of the ordinary.

Cheesecake, ice cream, apple pie and chocolate cake are the hardy perennials of the dessert category, and they make their presence known this year as every year. Hotels are most likely to offer cheesecake on the menu; caterers are most likely to report it a good seller.

An interesting diagram could be made tracking what desserts succeed best in what sectors—a kind of cake-and-pie chart, if you will. For example, apple pie has its strongest following in catering, hospitals and colleges, while cream pies of any kind do well in fine dining. Carrot cake makes the biggest hit in family restaurants and in B&I operations. Both schools and casual restaurants favor ice cream pie. And nursing home foodservice managers report their best results with cookies, white cake, chocolate cake and angel food cake, in that order. (For what it's worth, nursing homes also house the most avid fans of plain rhubarb pie.)

Where does fresh fruit fit into this high-calorie picture? Two out of five operations feature it on their dessert menus, most commonly colleges, nursing homes and hospitals. Of these three, colleges have the best luck with it: Almost half the college operations surveyed say it sells well, compared to one-third of each of the other two sectors. **R&I**

■ BUSINESS TRENDS

Prime Beef Leads Sales at Upscale Steakhouses

Red meat accounts for up to 70% of sales at Morton's, Lawry's, Palm and other high-end dinner houses.

By Lori Oleinick Dube

Since the 1970s, the health craze has been as much a part of American culture as apple pie. But regardless of doctors' health warnings, and perhaps because of them, business at the nation's upscale steakhouses is sizzling hot.

"When *Time* magazine came out a few years ago with a cover story that said beef is bad, our sales were never affected, and in fact our sales went up a little bit," says Michael Archer, president of the 13-unit Morton's of Chicago.

At the three Lawry's The Prime Rib restaurants, where slabs of prime rib are the house specialty, the opinion that beef is *verboten*—dietarily speaking—hasn't made a dent in sales.

"It may in fact be an odd case, where it is really helping our business because, true, a lot of people are simply eliminating beef from their diet because their doctors say so, but a lot of people aren't. They are saying to themselves, 'I want to eat beef less, but when I want to have beef, I'm going to go out and get the best beef I can find,'" says Richard R. Frank, vice president and chief financial officer of the Los Angeles-based chain.

Last year's sluggish performance by budget steakhouses proves Frank's point. Of the nine such chains listed in *R&I*'s ranking of the country's 400 biggest foodservice operations (July 10, 1991, issue), only three registered positive real sales growth.

Lawry's offers customers a six-ounce portion of its best-selling prime rib

THE MENU MIX

At most upscale steakhouse operations around the country, beef entrees comprise more than 75% of sales, but many admit to adding more fish items to their menu in recent years to give diners a more healthful alternative. Diversification of menus, even among steakhouse restaurants with national reputations, seemed for many to be the right move.

Fifteen years ago, Ruth's Chris Steak House put lobster on its all-beef menu. Five years ago, it added salmon, tuna, lamb chops and veal chops. A year later, chicken was added.

"It was to give the diners an alternative, just in case they didn't want to eat steak," says Ruth Fertel, founder of the 29-unit chain, which is based in New Orleans.

Currently, 76% of Ruth's Chris's sales are from beef, 11% from lobster, and only 3% from chicken. Satisfied with the current menu mix, Fertel has no plans to add additional entrees.

At the Old San Francisco Steak House, Barry A. Brown, president and CEO, says menu diversification has helped sales climb in his four Texas restaurants. When Brown joined the company four years ago, seafood accounted for only 5% to 7% of the restaurants' sales. Adding items such as Norwegian salmon, swordfish and Texas gulf snapper to the menu has led seafood to account for 25% of total sales.

"I still believe that while we are primarily a steakhouse—about 80% of our business is beef—we still need to cater to that person who wants a fresh piece of fish by offering them more than one type of fish or one type of chicken," says Brown.

At the 11 Palm restaurants, a multifaceted menu is nothing new. While renowned for prime aged beef, only 50% of the chain's sales comes from beef entrees. Lobster and fish account for 25% of entree sales, and another 25% from Palm's Italian selections.

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CHAINS

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"People talk about diversifying their menus, and that's something we've always had," says Fred Thimm, chief operations officer at the New York-based chain.

PORTIONS: IS BIGGER BETTER?

Because it is known as a steakhouse, Palm's tradition of variety is not well-known among nonregulars. Over the last year, when restaurants have all felt the economic crunch, Palm has enhanced marketing efforts to get the word out.

"In a recessionary environment, where suddenly you feel the pinch of competition, we are starting to make infrequent and new customers aware of the fact that if you go to the Palm for lunch, you don't have to have an 18-ounce steak," says Thimm. "We have been reorienting our menu to feature some of the items our regulars have always known we have, for instance pasta, chicken and salads."

Because beef continues to be the bread and butter for upscale steakhouses, some have decided to try giving their customers what they want—but less of it.

The Old San Francisco Steak House and the Palm offer smaller portions of their regular-size beef entrees. At Lawry's, one of the only three additions to their menu in the last decade is the California cut, a 6-ounce portion of prime rib, instead of their traditional 10- or 11-ounce slice.

When the Palm closed its San Francisco restaurant last year, the consulting firm used to evaluate the restaurant's demise made it clear that huge portions of quality beef were not a sure ticket to success.

When the Palm opened another restaurant in Philadelphia, it experimented by offering a smaller version of many of the full-size entrees. For instance, in addition to the 18-ounce sirloin, customers could choose a 12-ounce sirloin.

"Naturally, it had an effect on the average check," says Thimm. "But it has its costs and benefits. The benefit was we achieved rapid market acceptance in Philadelphia."

In future Palm openings, Thimm says a modification of the smaller-portion concept will be used.

In Palm's successful restaurants around the country, Thimm has seen a trend among diners who are cutting back on beef consumption by sharing entrees.

Most steakhouses offer smaller portions of regular-size beef entrees.

"People are real interested in splitting items. That's a trend we've seen that we encourage," says Thimm. "A couple might have come in in the past and had two New York strips, and now they might order one New York strip and a piece of fish and split it."

However, at places like Morton's, where large portions are their trademark, there hasn't been a noticeable change in diners' consumption habits since the first restaurant opened in 1978.

"If you're coming to Morton's, you're coming with the idea in mind that you're going to be a little bit decadent," says Mary Jo Newberg, director of sales and public relations. "When people make the reservation to come here, compromise isn't exactly top of mind for them."

Taking great pride in its portions, Morton's gladly wraps up diners' leftovers in fancy silver-embossed doggie bags.

STAKING OUT NEW MARKETS

Perhaps the greatest indication that upscale steakhouses are operating in the pink is that most have plans for future expansion domestically and some even internationally.

The Old San Francisco Steak House plans to expand in Texas, and Ruth's Chris Steak House will open one or two new franchises and probably one company restaurant by year end. Morton's is slated to open restaurants in Cincinnati, San Antonio and Palm Beach in the second half of 1991, and is examining expansion into Europe, which should become a reality within the next two years.

Lawry's isn't planning to open any new U.S. restaurants, but continues to field calls from Japanese businesspeople expressing interest in opening a Lawry's in that country.

According to Frank, securing the appropriate piece of real estate in Tokyo for the project remains a sticking point. He has no doubt, however, that the Japanese, whose appetite for beef has been whetted by some 800 McDonald's units in their country, will adopt Americans' fondness for beef. "Our restaurants are very popular with Japanese visitors to the U.S.," says Frank. "It's so unusual to the Japanese culture and diet. They seem to like it."

Lori Oleinick Dube is a Chicago-based freelance writer.

STEAKHOUSE CHAINS AT A GLANCE

Lawry's The Prime Rib
No. of units: 3. *1990 sales:* about $16 million. *Average unit volume:* $5.5 million. *Check average with alcohol:* $28. *Best seller:* prime rib. *Alcohol sales:* 20%-25% of total.

Morton's of Chicago
No. of units: 13. *1990 sales:* N/A. *Average unit volume:* N/A. *Check average with alcohol:* $45. *Best seller:* porterhouse steak. *Alcohol sales:* 18% of total.

Old San Francisco Steak House
No. of units: 4. *1990 sales:* $16 million. *Average unit volume:* $4 million. *Check average with alcohol:* $23-$25. *Best sellers:* filet mignon, prime rib, sirloin strip. *Alcohol sales:* 18% of total.

Palm Restaurants
No. of units: 11. *1990 sales:* N/A. *Average unit volume:* $3.5 million. *Check average with alcohol:* $45. *Best sellers:* New York strip, lobster. *Alcohol sales:* 22% of total.

Ruth's Chris Steak House
No. of units: 29 (30th opens in September). *1990 sales:* $60.7 million. *Average unit volume:* $2.4 million. *Check average with alcohol:* $38. *Best sellers:* filet mignon, rib-eye steak. *Alcohol sales:* 22% of total.

ACTION EXPRESS

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RESTAURANTS & INSTITUTIONS, a Cahners publication
1350 E. Touhy Ave., P.O. Box 5080, Des Plaines, IL 60017-5080 Phone: 708/635-8800

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RESTAURANTS & INSTITUTIONS (ISSN 0273-5520) (GST #123397457) is published biweekly (with an additional issue in January, May, August, September and November, and two extra issues in March) in national, demographic and separate editions by the Cahners Publishing Company (subscription includes all issues). Cahners Publishing Company is a Division of Reed Publishing USA, 275 Washington St., Newton, MA 02158-1630. Terrence M. McDermott, President; Frank J. Sibley, Executive Vice President; Charles H. Moodhe, Senior Vice President/General Manager, Chicago Division; Jerry D. Neth, Senior Vice President/Publishing Operations; J.J. Walsh, Senior Vice President/Finance; Thomas J. Dellamaria, Senior Vice President/Production and Manufacturing; Ralph Knupp, Vice President/Human Resources. Circulation records are maintained at Cahners Publishing Company, 44 Cook St., Denver, CO 80206-5800. Phone: 303/388-4511. Second-class postage paid at Denver, CO 80206-5800 and additional mailing offices. **Postmaster: Send address corrections to RESTAURANTS & INSTITUTIONS, P.O. Box 173377, Denver, CO 80217-3377.** RESTAURANTS & INSTITUTIONS copyright 1991 by Reed Publishing USA; Ronald G. Segel, Chairman and Chief Executive Officer; Robert L. Krakoff, President and Chief Operating Officer; William M. Platt, Sr. Vice President. Annual subscription rates for nonqualified people: USA, 1 year $104.95, 2 years $204.95; Canada, 1 year $192.55, 2 years $326.30; Mexico, 1 year $179.95, 2 years $304.95; other countries, 1 year $234.95, 2 years $399.95 for surface mail and 1 year $374.95, 2 years $679.95 for air mail. Single copies are available for $15 (USA, Canada, Mexico and foreign). The March 27, July 10, July 24 issues are available for $25 (USA, Canada Mexico and foreign). Please address all subscription mail to RESTAURANTS & INSTITUTIONS, 44 Cook St., Denver, CO 80206-5800. RESTAURANTS & INSTITUTIONS has also been published as "INSTITUTIONS, Magazine of the Service World" and INSTITUTIONS/VOLUME FEEDING MANAGEMENT. RESTAURANTS & INSTITUTIONS and R&I are registered trademarks of Reed Properties Inc., used under license.